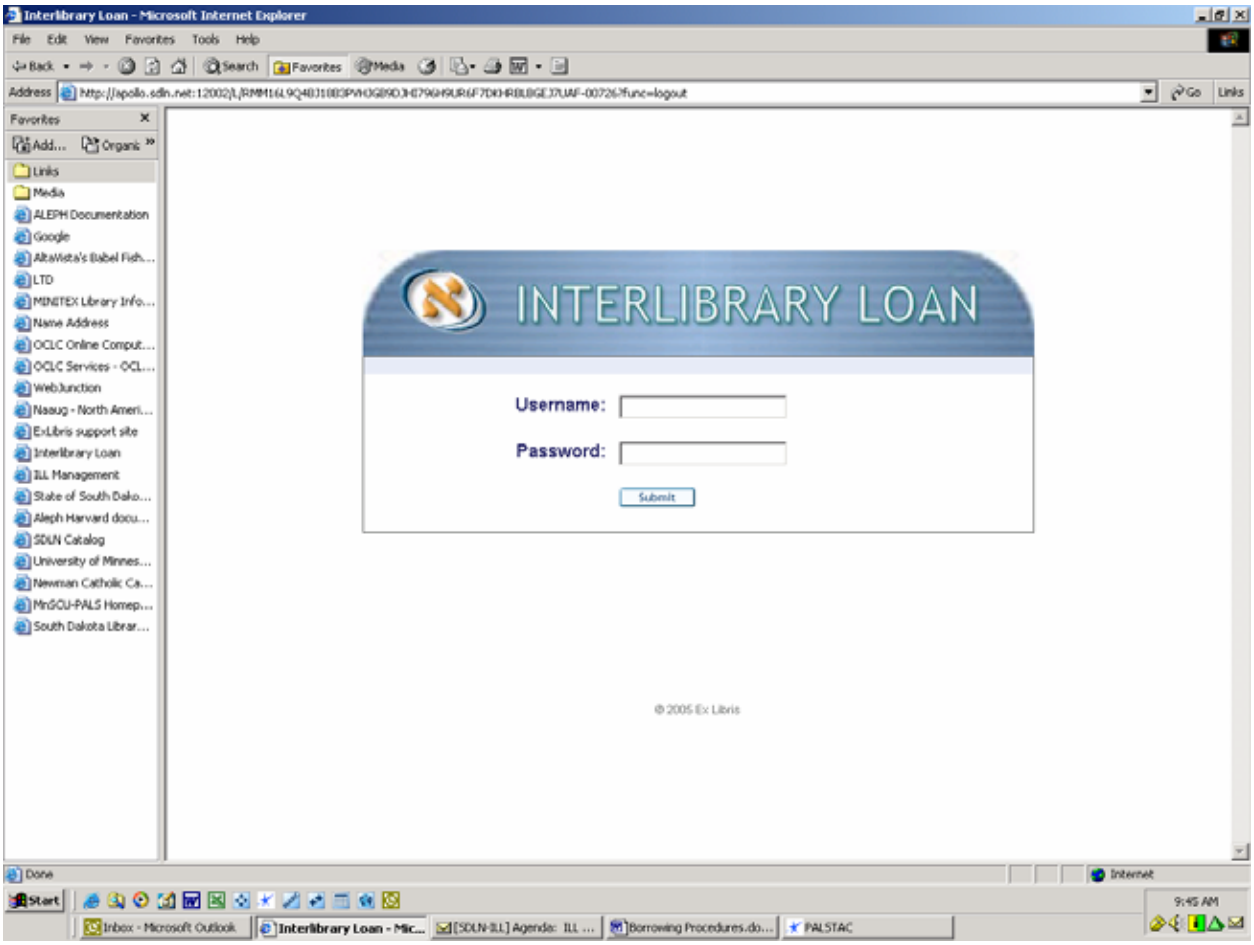
Basic Borrowing Cycle:

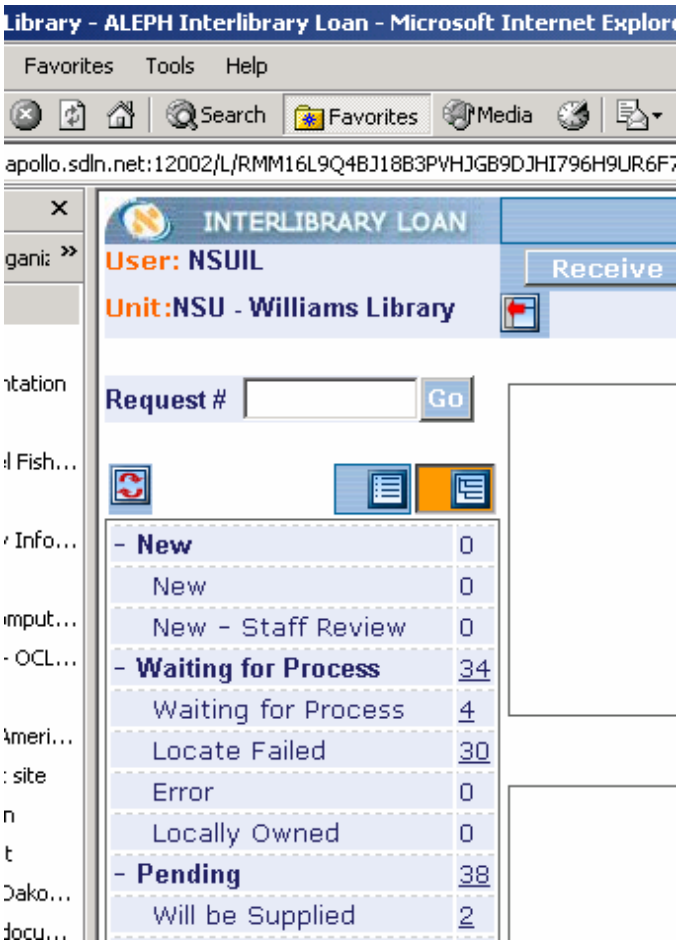
- **Requests are submitted by patrons through the OPAC or by ILL staff through the borrowing tab/new request button.**
- **SDLN auto processing moves those from the 'new category' to one of the waiting for process nodes.**
- **ILL staff manually process those requests from the 'new - staff review' category.**
- **Once requests are located, they are sent on to the potential suppliers.**
- **If the system does not find the potential supplier, but you know that a library can supply the item you can manually add the potential supplier to the request.**
- **If a request cannot be filled, a letter is sent to the patron and the request is deleted.**
- **Received items are received and can then go to the ILL shelves in circulation to be loaned to the patron. Notices are sent to patrons for loaned items.**
- **Articles are received and sent directly to the patron. Article requests are closed at this time.**
- **When the patron brings the item back it is returned and sent back to the lending library.**
- **When the lending library 'checks-in' the item it becomes closed.**
- **Closed items can be deleted.**

- **Borrowing Procedures:**

http://apollo.sdln.net:12002/L

Logon –

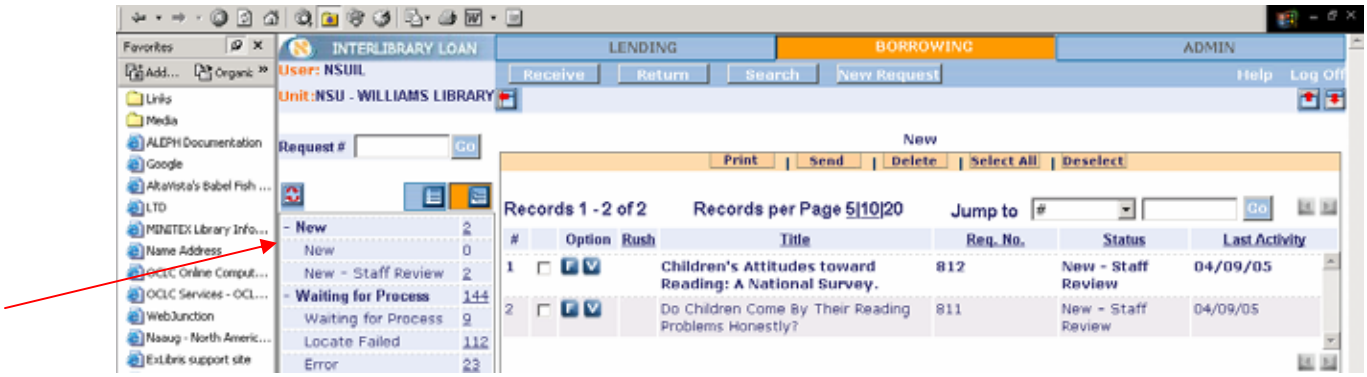




The “+New” and the “+Waiting for Process” nodes deal with processing requests from patrons and sending them to the potential suppliers (lending libraries).

+NEW

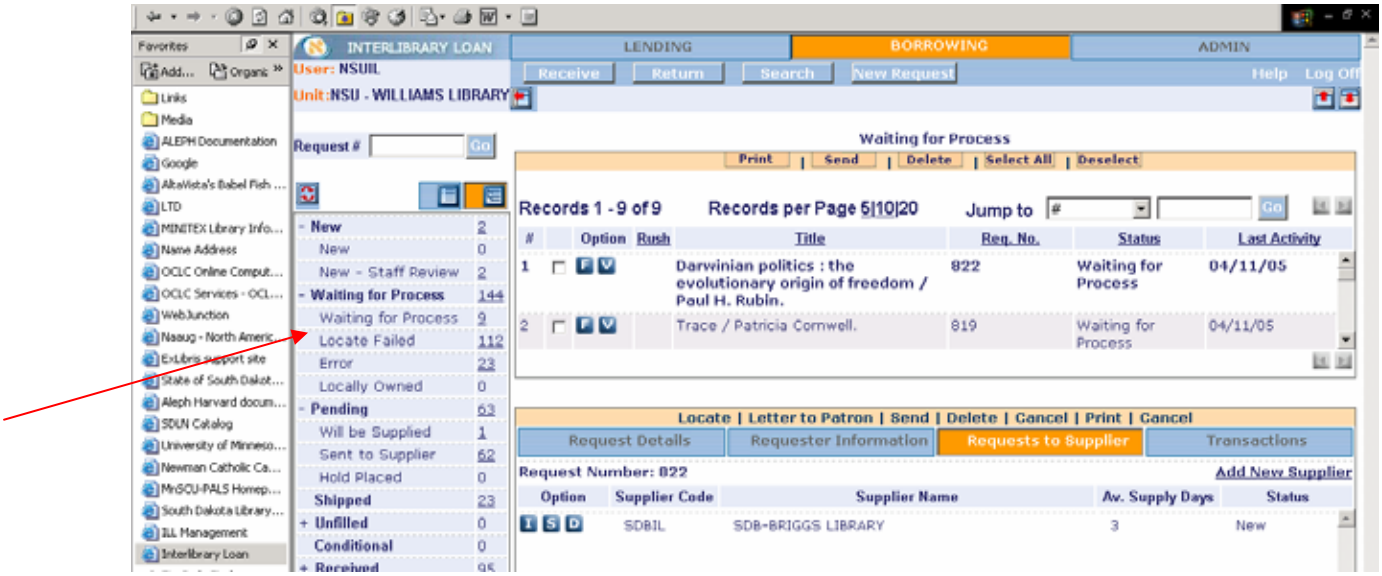
- These are requests from our patrons. New requests are requests entered by either the patron from the OPAC or by staff using the ‘New Request’ button above.
- New requests fall into the following two nodes.



1. New

- The system automatically processes these request every half hour and moves them into the appropriate ‘waiting for process’ node.
- You can manually move these to the ‘waiting for process’.
  - Click on the number behind ‘New’.
  - Click on the ‘F’ button in the upper right pane to view the complete record in the lower right pane.
  - Click on locate in the task bar of the lower pane. Request will move to the appropriate node of ‘waiting for process’.

2. **New – Staff Review**
    - These are requests entered by using the blank forms or a request in which the patron has added a note. These requests need to be reviewed by staff.
    - Click on the number behind 'New – Staff Review'. The records appear in the upper right pane.
    - You can manually review each record by clicking on the 'F' button in the upper pane and viewing the request details in the lower pane.
    - Or they can be printed out in two ways – printing after locating will give you more information on the request:
        - Individually from the print button in the lower pane. Only the displayed request prints.
        - All at one time by selecting 'select all' button in upper pane and then selecting 'print' button in upper pane. All records will print that are in the current display.
            - If 5 records – then those 5 print.
            - If 10 records – then those 10 print.
            - If 20 records – then those 20 print.
            - If you have more records than the 5/10/20 you can use the right arrow (next) in the upper pane task bar to move to the next set of records. Then once again select all and print.
    - Review the request. Is it available in SDLN? Does it have a note from the patron? Does it have an OCLC# or an ISBN/ISSN number?
    - Edit the record as needed.
    - To add the OCLC# and/or the ISBN/ISSN number click on 'add line' in the lower pane. You will need to be in the 'request detail' tab to see the 'add line' button on the right hand side.
        - Select the line from the dropdown box.
        - Type in the appropriate information.
        - Click the submit button.
        - Wait for the screen to refresh before proceeding or you may loose the information added.
    - You are now ready to locate this record. Click on the 'locate' button in the lower pane. The record will move to the appropriate 'waiting for process' node.



+WAITING FOR PROCESS

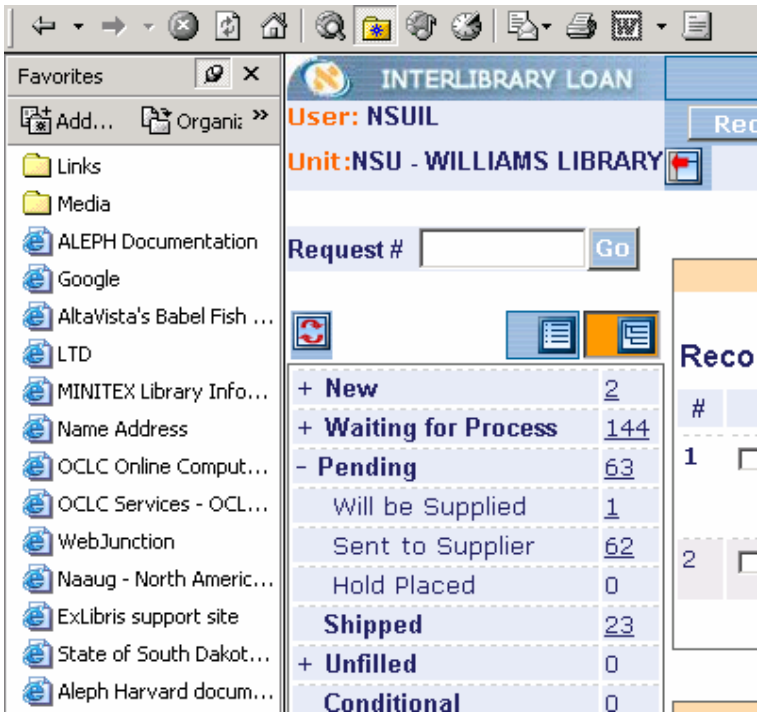
- These are requests that have been through the initial process of being located. In other words, the SDLN database has been searched to see if there is a match for these requests. The results of this locate procedure determine which node the request will fall into.
- 'Waiting for Process' is divided into four nodes.
- Printing: Requests can be printed out in two ways – printing after locating will give you more information on the request:
    - Individually from the print button in the lower pane. Only the displayed (it will be bolded in the upper pane) request prints.
    - All at one time by selecting 'select all' button in upper pane and then selecting 'print' button in upper pane. All records will print that are in the current display.
        - If 5 records – then those 5 print.
        - If 10 records – then those 10 print.
        - If 20 records – then those 20 print.
        - If you have more records than the 5/10/20 you can use the right arrow (next) in the upper pane task bar to move to the next set of records. Then once again select all and print.

1. **Waiting for Process.**
    - These requests from our patrons have been located in the SDLN catalog.
    - Print these requests (see above).
    - To pull up these requests you can either type the number in the 'request #' box in the upper left pane and press go or you can click on the 'F' next to the request in the upper pane for the full view in the lower pane.
    - When the request is displayed in the lower pane, you can move to the 3rd tab 'requests to suppliers' and click 'S' on the supplier to send the request to potential supplier.
    - Write the potential supplier codes on the request.
    - Do stats on the sheet in tech services.
    - File in the pending ILL box in tech services.

2. **Locate Failed.**
    - These requests were not located and you will need to search the SDLN catalog to see if there are potential suppliers.
    - Edit the request details using the 'add line' if you need to add information.
    - If the item is available in SDLN, you can manually add a potential supplier. Some libraries do not lend videos, fiche or film and they may not be potential suppliers. Check the ILL policies information.
    - If not available in SDLN, we will have to do an OCLC request at this time. Once you have requested the item on OCLC, add NSU as the potential supplier and send the request.

3. **Error.**
    - This category is in limbo at this time. We can't change or delete items that have defaulted to this category. Hopefully this will be updated soon. Requests that have gone to this category will have to be resubmitted and redone. Eventually we should be able to delete requests in this category.

4. **Locally Owned.**
    - According to the catalog this item is available from NSU. Verify that the item is truly available. If it is, send a notice to the patron informing them of the fact that the item is available at NSU and they can come to the library to check it out. If it is an article, inform them that it is available either full text or in a locally owned journal.
    - If the item is truly not available, then add potential suppliers and send it to the first supplier on the list.



+PENDING

- These are requests that have been sent to potential suppliers.
- We are waiting for the potential supplier to handle our requests.
- This node has 3 potential statuses.

1. **Will be Supplied:**
   - The potential supplier has moved our request to will be supplied. They are working on this request.

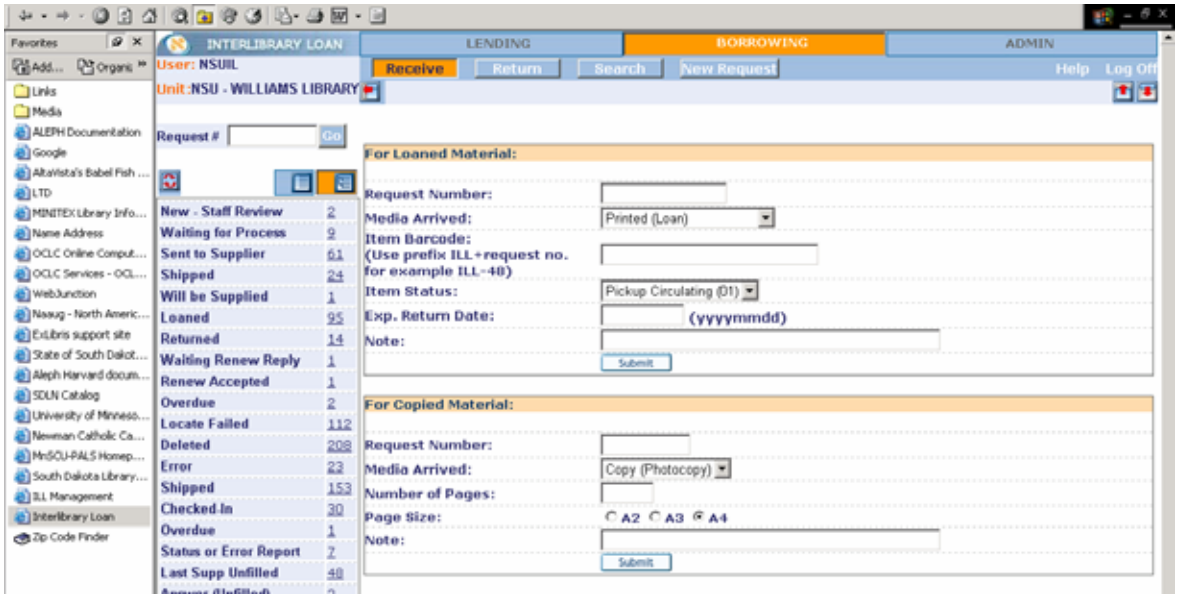
2. **Sent to Supplier:**
   - The request has been sent to a potential supplier, but they have not acted on the request at this time.

3. **Hold Placed:**
   - The potential supplier has put a hold on this request and will send it when the item is available. Most potential suppliers do not do this unless they have asked you if you want them to place a hold on the item.

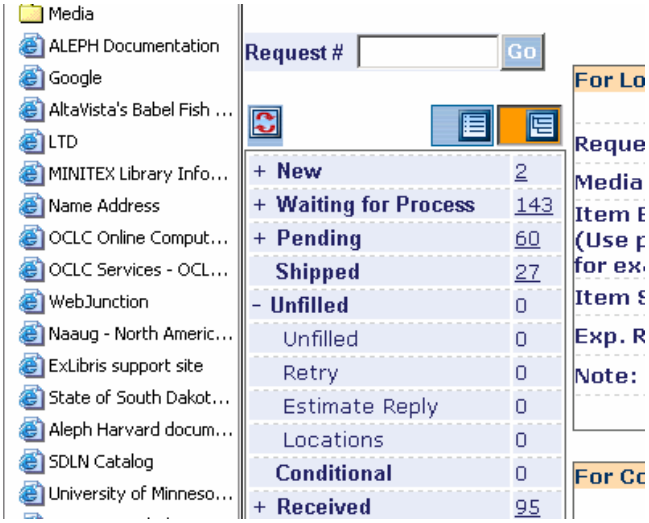
SHIPPED

- Requests in this node have been shipped by the supplier
- You will want to watch the 'last activity'. If an item has been shipped several days earlier and we have not received it, we will have to contact the lending library.
- To receive a shipped item:
  - Click on the receive button above the upper pane.
  - Fill in the form and click on submit.
    - There are two forms – one for loans and one for copies.
- Copied Material:
  - Request Number: Enter the ILL number of the request received.
  - Media Arrived: Choose the media format type of the received item.
  - Number of Pages: Enter the number of pages copied.
  - Page Size: This can be skipped.
  - Note: Any text entered into this field will be attached to the 'Received' message, which is automatically sent to the supplier.
- Loaned Material:
  - Request Number: Enter the ILL number of the request received.
  - Media Arrived: Choose the media format type of the received item.
  - Item Barcode: Enter the barcode from the item to be used to check the item out in circulation. Remember – wand the barcode last as it will automatically submit the receive form.
  - Item Status: Choose the item status that will be assigned to this ILL material. The item status determines the loan procedure for the arrived item.
  - Expected Return Date: This is the date by which the supplier requires the material be returned. This can be left blank, as the system will use

the date entered by the supplier. (If this is an OCLC request then use the date from the OCLC paperwork.) YYYYMMDD.
    - Note: Any text entered into this field will be attached to the 'Received' message, which is automatically sent to the supplier.
- When you click on 'Submit' to register the receipt of an item, the following actions are performed:
    - The status of the request is changed to LON – loaned.
    - A 'Received' message to the supplier is automatically generated.
    - The material is ready to be checked out to the patron in circulation if it is a loan. If it is a copy request the request is closed (completed).



- When you submit the receive form, it generates an arrival letter for our patron. Print out only those letters for items that we are loaning. You can just close those for articles.
- Label the item if it is a loan.
- Place items for loan on the ILL shelves at circulation.
- Copies can be sent directly to patrons through campus mail.
- Do stats on the stat sheet in tech services.
- File loan paperwork by the patron's last name.



+UNFILLED

- These are requests that can't be filled for some reason.
- There are four categories under this node.

1. **Unfilled:**

- When a request is not filled, it will appear in this category.
- If time allows we can try an OCLC request if other libraries outside of SDLN own the item.
- If an OCLC request is sent, add NSU as a new supplier and send.
- If this request is truly unfilled, send the patron a letter letting them know that we were unable to fill this request.
    - From the lower pane, click on letter to patron.
    - Click on cancellation of request – really is an unfilled letter.
    - Add a note as to why we were unable to fill the request and click on submit.
    - Print the letter and send to the patron.
- Once the patron has been notified, this request can be deleted. This can be done from the lower or upper pane.
- Click on the delete button and confirm that you really want to delete the request.

2. **Retry:**

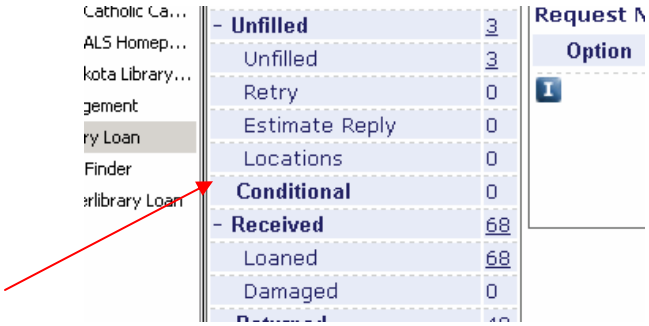
- When the supplier answers your request as follows: Retry at a later date, you can resend the request to the supplier. To resend the request, click 'add new supplier' from the request to supplier tab in the full record. This allows you to re-register the same supplier to the suppliers list. After adding the supplier again, send the request again.

3. **Estimate Reply:**

- I'm not sure what this is – I am assuming that this would be a reply stating that the lender estimates that they can supply the item at a later date.

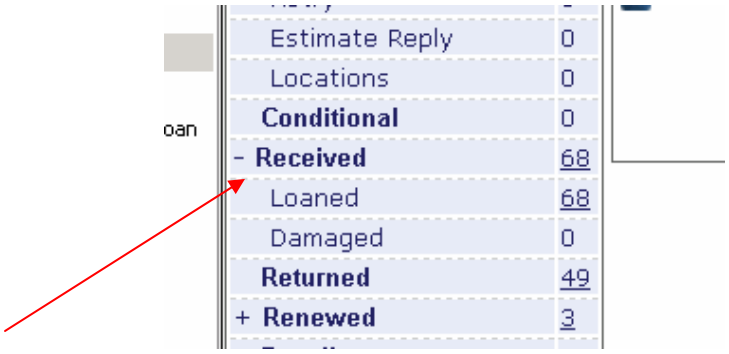
4. **Locations:**

- I can't find anything on this and have never seen anything in this category.



CONDITIONAL

- If a supplier answers your request with a conditional request, the request status becomes conditional reply and will appear in this node.
- Respond to a conditional from the full record in the lower pane.
- Click on the supplier tab and select 'CR' for conditional reply.
- Click on either yes or no depending if we can accept the conditions or not.
- Add a note if necessary and click on submit.
- This option only appears if the lender has sent a conditional message.

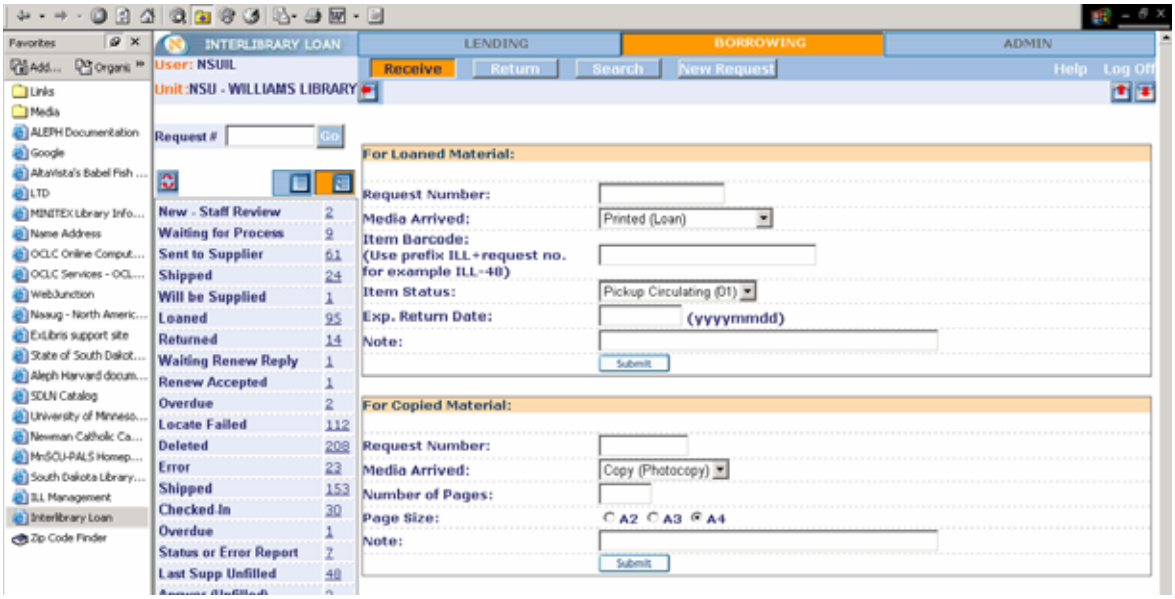


+RECEIVED

1. **Loaned**
   - This node shows all requests that have been received and are either loaned to the patron or on the ILL shelves at circulation ready to be loaned to the patron.
   - To receive a shipped item:
     - Click on the receive button above the upper pane.
     - Fill in the form and click on submit.
       - There are two forms – one for loans and one for copies.
   - Copied Material:
     - Request Number: Enter the ILL number of the request received.
     - Media Arrived: Choose the media format type of the received item.
     - Number of Pages: Enter the number of pages copied.
     - Page Size: This can be skipped.
     - Note: Any text entered into this field will be attached to the 'Received' message, which is automatically sent to the supplier.
   - Loaned Material:
     - Request Number: Enter the ILL number of the request received.
     - Media Arrived: Choose the media format type of the received item.
     - Item Barcode: Enter the barcode from the item to be used to check the item out in circulation. Remember – wand the barcode last as it will automatically submit the receive form.
     - Item Status: Choose the item status that will be assigned to this ILL material. The item status determines the loan procedure for the arrived item.
     - Expected Return Date: This is the date by which the supplier requires the material be returned. This can be left blank, as the system will use the date entered by the supplier. (If this is an OCLC request then use the date from the OCLC paperwork.) YYYYMMDD.

- Note: Any text entered into this field will be attached to the 'Received' message, which is automatically sent to the supplier.

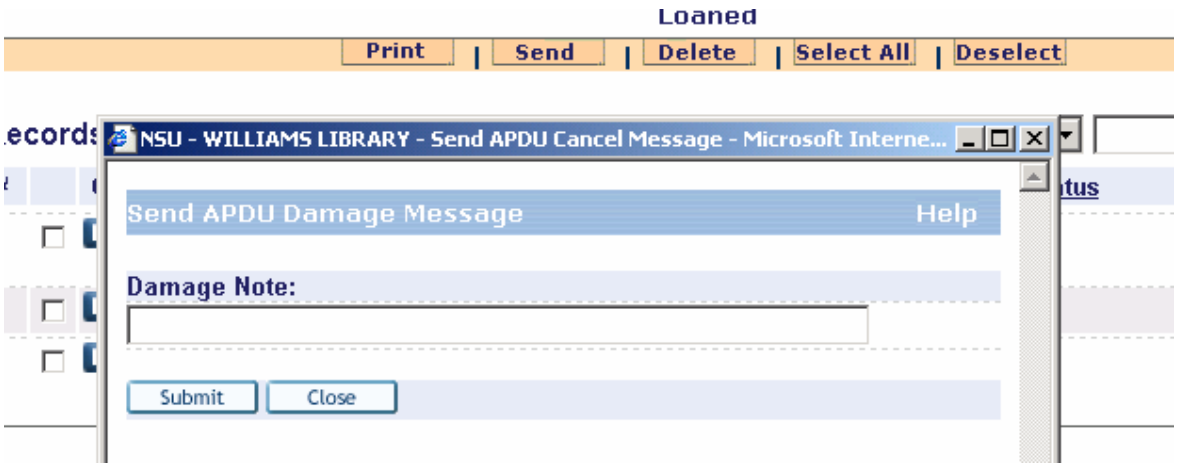
- When you click on 'Submit' to register the receipt of an item, the following actions are performed:
  - The status of the request is changed to LON – loaned.
  - A 'Received' message to the supplier is automatically generated.
  - The material is ready to be checked out to the patron in circulation if it is a loan. If it is a copy request the request is closed (completed).



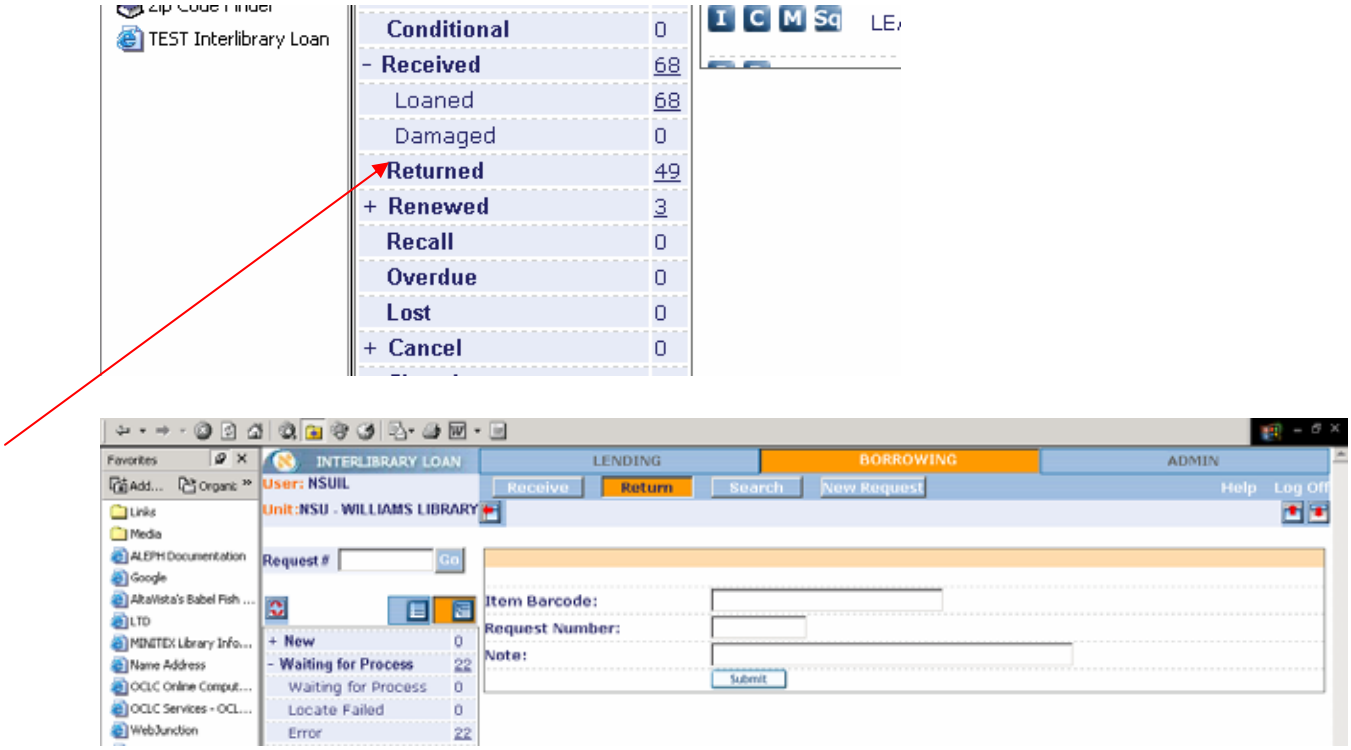
- When you submit the receive form, it generates an arrival letter for our patron. Print out only those letters for items that we are loaning. You can just close those for articles.
- Label the item if it is a loan.
- Place items for loan on the ILL shelves at circulation.
- Copies can be sent directly to patrons through campus mail.
- Do stats on the stat sheet in tech services.
- File loan paperwork by the patron's last name.

2. Damaged

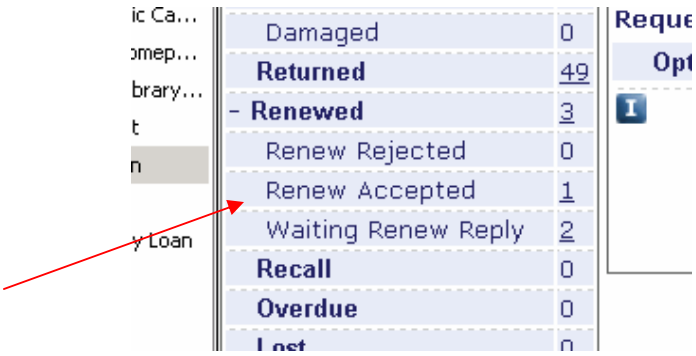
- If an item that has been received is damaged, the lender can be notified by going to the full view of the item in the lower pane and click on the supplier tab. Click on the 'D' to activate a damaged message.
- Enter a note and click on submit to send the message to the lender.



RETURNED

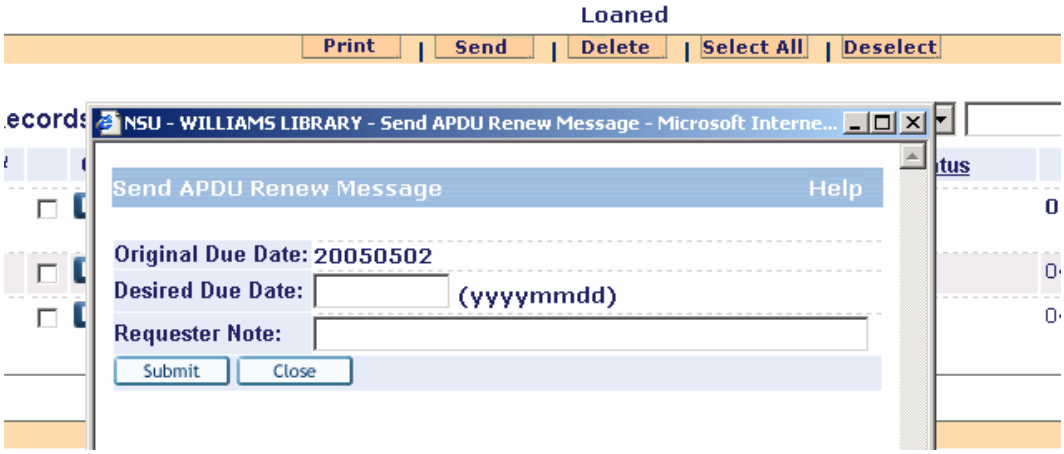


- This node is a summary of items returned to the lending library.
- To return an item, click on the return tab above the upper pane.
- You can either type in the Aleph ILL number or the barcode that was assigned when the material was received. Both will activate the return. It will also check it in if it is still charged to a patron.
- Any text entered in the note field will be attached to the returned message that is automatically sent to the lending library.
- Items in this node should be checked periodically to make sure that something hasn't been lost between when NSU has returned it and the lending library receiving it back.



+RENEWED

- Once a request has been received and loaned a renew request can be sent.
- This is done from the full view of the record in the lower pane.
- In the supplier tab, click on the RN button to activate the renew command.

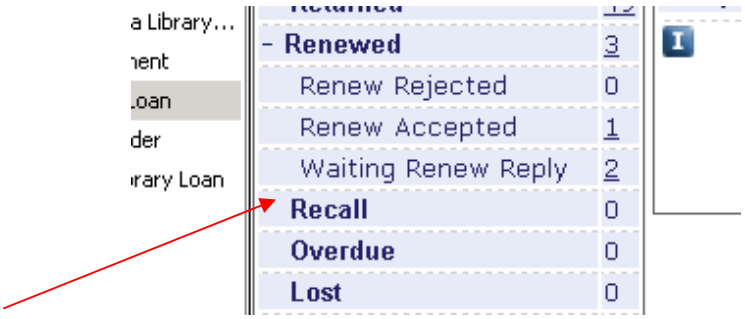


- Insert the renewal date (yyyymmdd) and any note if needed.
- Click submit – this action sends the request to the lending library and changes the status from ‘loaned’ to ‘waiting renewal reply’.
- Patrons can request renewals through the OPAC.

1. **Renew Rejected**
    - If a renew request has been denied by the lending library, the request will fall under this node.

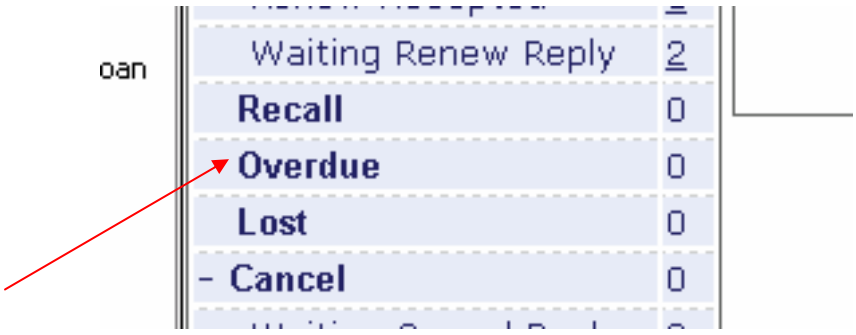
2. **Renew Accepted**
    - If a renew request has been accepted by the lending library, the request will fall under this node.
    - A renew accepted answer from the lender will update the loan due date in the Aleph circulation system.

3. **Waiting Renew Reply**
    - These are renewal requests that have not had a response from the lending library.



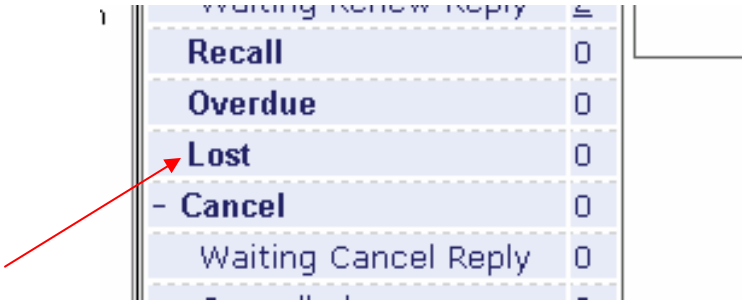
RECALL

- If a request has been recalled it will appear in this node.
- To reply to the recall request, click on the full view of the record.
- From the full record in the lower pane, click on the 'recall answer' – this only appears when there has been a recall.
- Select 'YES' – libraries have the option to recall an item and we have the responsibility of recalling the item from the patron.
- Enter the date that we will return it by – I would give us 3 days to get it back from the patron and get it returned, unless it is over the weekend. If that is the case, use 5 days.
- The loaned due date is updated according the recall date entered.
- Notify the patron that we need the item back immediately. A phone call would be best, but if they do not answer send an email.



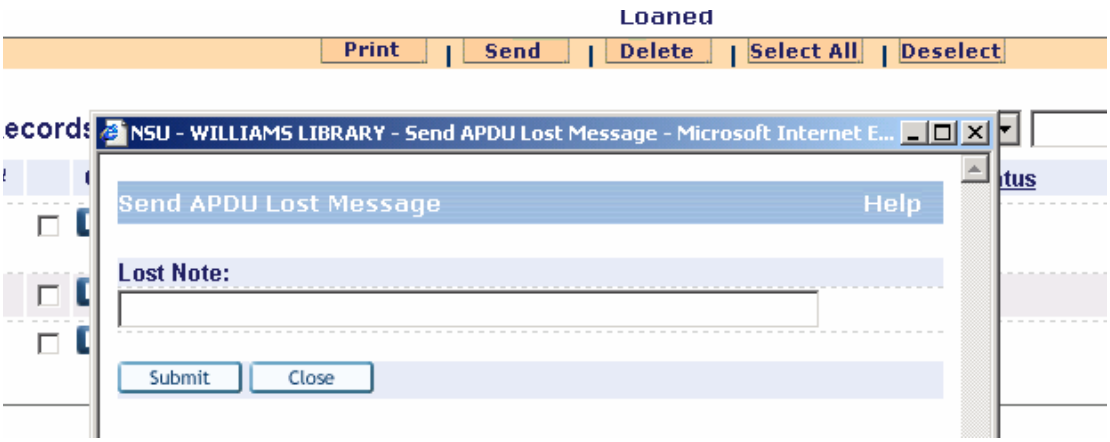
OVERDUE

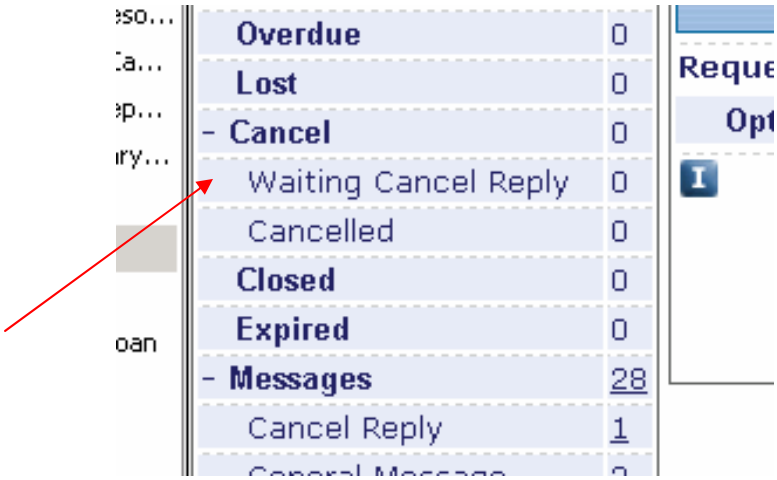
- This node lists items that are overdue. Items we have borrowed for our patrons.
- A letter to the patron can be printed and sent by clicking on the ‘letter to patron’ tab and selecting overdue letter.
- You can also check under the transaction tab to see what letters have been sent to the patron.



LOST

- If an item that has been lost, the lender can be notified by going to the full view of the item in the lower pane and click on the supplier tab. Click on the 'L' to activate a lost message.
- Enter a note and click on submit to send the message to the lender.





+CANCEL

1. **Waiting Cancel Reply**
   - Requests can be cancelled after they have been sent to a potential supplier.
   - If the lender has not processed the request at all the cancel is automatic.
   - If the lender has started processing, the cancel request will stay in this category until the lending library has responded to the cancel message.

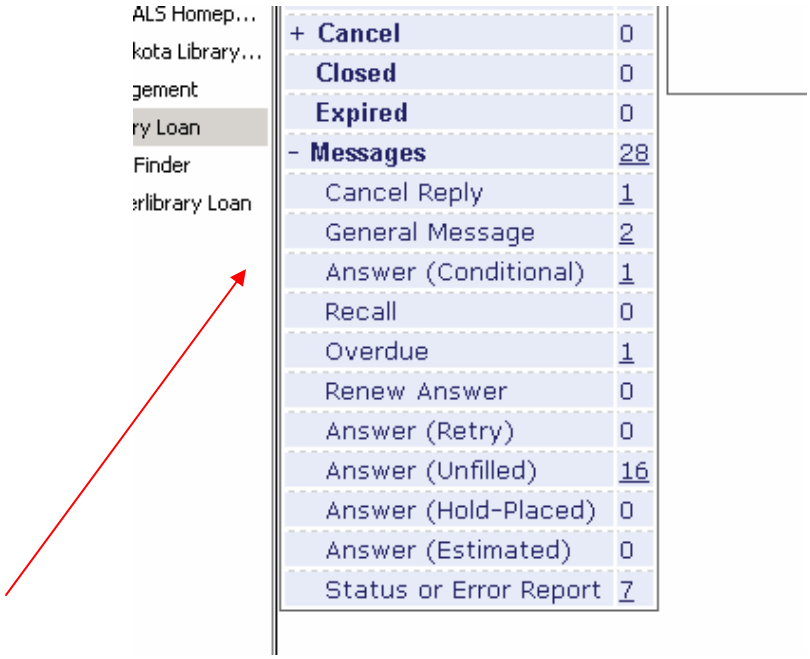
2. **Cancelled**
   - Items that are automatically cancelled will be in this category.
   - After a lending library responds to the cancelled request it will fall in this category unless it has already been shipped.
   - Cancelled requests can be deleted from either the lower or upper pane.
   - Notify the patron if a request has been cancelled by sending them a cancelled letter with the reason it has been cancelled.

CLOSED

- Requests that have moved to the closed node are requests that have gone through the complete borrowing cycle or requests that have had the status changed to closed.
- Requests in this category can be deleted, but the stats are retained and the request can still be found by searching on the ILL number.

EXPIRED

- Requests in this category have expired. This does not mean that they have reached the patron's need by date, but that the potential supplier did not respond before the exiry date set by the system.
- You can change the status back to new and resubmit these requests.
- Check the need by date to make sure that there is time to have these requests filled by potential suppliers.



+MESSAGES

- Messages fall under the 12 categories listed below.
- Most messages have already been dealt with in a previous node. Those under cancel, conditional, recall, overdue, renew, unfilled… We have actually asked that when we clear up a request in a previous node that the message also is cleared up or not appear in more than one node.
- To clear up the message you must dismiss it. Click the 'D' to dismiss the message.
- General messages are the messages that usually need our attention because we have not taken care of them in another category.
- Other messages can be checked before being dismissed.

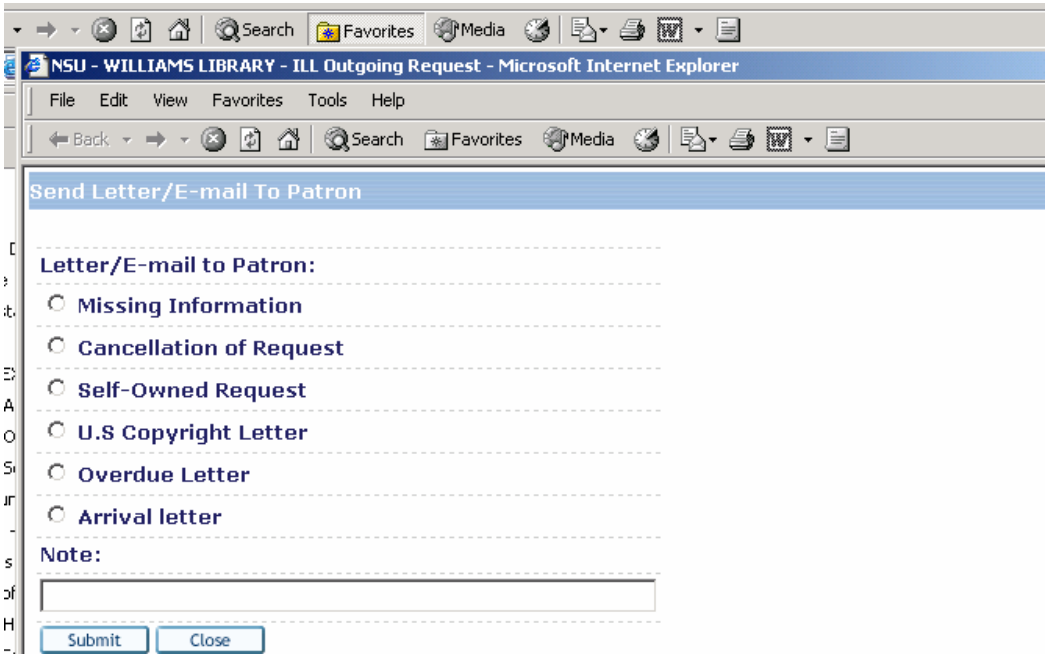
1. **Cancel Reply**
2. **General Message**
3. **Answer (Conditional)**
4. **Recall**
5. **Overdue**
6. **Renew Answer**
7. **Unanswered Requests**
8. **Answer (Retry)**
9. **Answer (Unfilled)**
10. **Answer (Hold-Placed)**
11. **Answer (Estimated)**
12. **Status or Error Report**

DELETING REQUESTS:

- To keep track of current valid requests, it is best to delete completed or cancelled requests.
- To delete a request you can click on the box in the upper pane and then click on the delete tab above the request information or when the request is in the lower pane, you can delete it by pressing on the delete tab in the lower pane.
- Some requests cannot be deleted. Shipped or loaned requests are examples of those that can't be deleted.

LETTERS TO PATRONS:

- At different times you have the option of sending a letter or an email to the patron.
- When you click on the 'letter to patron' tab you will get the following choices.



1. **Missing Information**
   - Use this letter is you do not have enough information to fill the request.

2. **Cancellation of Request**
   - This letter is used if for some reason you cancel the request or any potential suppliers have not filled it.

3. **Self-Owned Request**
   - If our library owns the item send this letter to the patron to inform them that the item is available in our library or online.

4. **U.S. Copyright Letter**
   - This would be used if they have not signed a copyright statement for a journal request. This is done automatically for requests entered through the OPAC.

5. **Overdue Letter**
   - We can generate overdue letters for our patrons by using this letter template.

6. **Arrival Letter**
   - When we receive an item in the ILL module it automatically generates an arrival letter. Print this out for items that we loan and send it to the patron. This letter can be deleted for copy requests.